

**Achievement of Market-Friendly Initiatives and Results Program
(AMIR 2.0 Program)**

Funded By U.S. Agency for International Development

**Develop a
National Tourism Strategy**
Facilitation of Core Committee Meeting

Final Report

**Deliverable for BMI Component, Task No. 262.2
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Executive Summary

This assignment was conducted as part of the activities of the BMI Component (task number 262.2) in preparation for developing a national tourism strategy.

Through its assistance to the Jordan Tourism Board (JTB), AMIR Program will work with JTB and the various stakeholders towards developing an all-encompassing tourism strategy for both the public and private sectors that will later on evolve into a strategic agreement between both sectors.

A Strategy Steering Committee (SSC) of 10 industry leaders, chaired by H.E. Dr. Taleb Rifa'i, was formed to spearhead the initiative. The SSC will formulate the future vision and lay down the main elements of the strategy. To this end, the AMIR program recruited an industry expert, Mr. Matt McNulty, to work with the facilitator, Dr. Cathryn Goddard, in order to hold the first meeting of the Strategy Steering Committee on May 13, 2002 at JTB offices.

The consultant met with key members of the Jordan Tourism Board's Strategy Steering Committee as part of the process to initiate development of a National Tourism Strategy. These meetings took place with the subject matter expert, Matt McNulty, the Component Leader Ibrahim Osta, and the component Business Management Specialist, Diala Khamra between May 9-13.

The purpose of these meetings was to get general feedback from the Strategy Steering Committee members on their expectations of the strategy initiative, specifically as related to the first meeting, scheduled on the 13th of May. Accordingly the meeting agenda was finalized as follows:

- Opening remarks
- Introduction to strategy considerations
- Clarifying the vision
- Discussion of the elements of the strategy
- Response to discussion
- Next steps

The consultant, in close cooperation with the subject matter expert, designed and facilitated the Core Committee meeting, May 13, 2002, during which the consulting team presented attendees with an overview of the initiative structure and objectives and received their feedback with respect to the following:

Clarification of the vision

Purposes

Results

Criteria

Elements of the strategy

Market makers

Market drivers

Next steps

Based on the meeting results, the consultant produced the agreed upon report, including a cover letter for signature by Mr. McNulty, and a series of next steps. That report was transmitted electronically to all participants May 15, 2002, as promised.

The following section provides the results of the first meeting of the Strategy Steering Committee along with the cover letter sent out to participants with the meeting results.

May 15, 2002

Dear Core Committee Members:

A journey of a thousand miles begins with a first step. The Jordan Tourism Board (JTB) has embarked on a bold initiative to develop a strategic agreement between the private sector and the government, based on a fresh look at the national tourism strategy. This partnership will include those necessary to ensure that tourism becomes a sustainable engine of economic and social growth for Jordan.

For the vision to become a reality, the JTB, with the support of the AMIR Program, will strengthen a network of stakeholders and international experts, harnessing our collective imagination, expertise and commitment to action.

Your initial brainstorming have planted the seeds of this process, which can develop and blossom over the next few months. We will work together to clarify the vision, refine the strategy and create cohesive support for making your ideas, plans and dreams a reality.

The following document includes the following:

- Clarifying the vision
 - Purposes
 - Results
 - Criteria
- Elements of the strategy
 - Market makers
 - Market drivers
- Next steps

This information provides guidance as well as background information that we will use as we prepare to meet again in Petra to map out how we will arrive at our shared goals.

We will be calling on you shortly for additional inputs and thank you for your enthusiasm and commitment. In the meantime, it would be very helpful if some of you could try your hand at developing vision statements, something that allows us to capture the uniqueness of Jordan as a tourist destination. You have the insights to know what's special about Jordan, so we would appreciate it if you try to put something into words to help us.

Best wishes,



Matt McNulty

Clarifying the Vision

Purposes

- Guarantee sustainability of culture, sites, environment
- Improve Jordan image
- Put Jordan on the world tourism map
- Create a vision of the industry
- Increase employment
- Position industry as key economic driver
- Improve the numbers
- Fix the industry
- Provide a road map for tourism
- Have one vision
- Clarify roles and responsibilities
- Qualify tour operators and upgrade status
- Establish a Jordanian Tourism Product
- Create unified image for Jordan tourism world-wide
- Brand Jordan
- Diversify product - build on natural assets
- Position Jordan as a premier destination
- Clarify Jordan's image
- Position Jordan as a stand alone destination
- Bring stakeholders together
- Bring all stakeholders into ONE team
- Harmonize efforts
- Make public sector aware of ROI in tourism
- Co-ordinate action
- Pool resources
- Unite efforts
- Define the product
- Prioritize markets
- Position Jordan
- Create cohesive plan
- Plan long term marketing activities
- Bring the best out of Jordan's potentials
- Increase income
- Sustain the market
- Define potential
- Develop potential
- Market potential
- Achieve optimal growth in tourism
- Ensure continued growth
- Sustain economic growth

Results

- Strengthened public and private sector support
- Strengthened JTB
- Enhanced image of Jordan
- Coherence
- Growth
- Sustainability
- Codes of conduct
- Networks and teams
- Happy tourists
- Standards
- Crisis proof tourism industry
- Educated public about product
- Increased length of stay
- Regional development
- Social benefits
- Increased variety of experience
- Quality tourists
- Jobs (2)
- Improved tourism product
- Excellence (2)
- Numbers of tourists
- Better living standards
- Employment generation
- Increased traffic
- Social benefits
- Sustainable growth in market
- Sustainable growth
- Steady growth
- Economic growth
- Overall growth

Results

- Smile ☺
- Protected environment
- Resource protected
- Practical ideas
- Excellence (2)
- Environmental balance
- Innovative development
- Creativity (2)
- Energy, enthusiasm
- Pride in Jordan
- Improved quality
- Higher occupancy
- Happy business owners
- Foreign currency
- Prosperity to community
- Better returns on investment
- Increased revenue
- Increased expenditure per night stay
- Mucho dineros
- Increased government receipts
- Increased revenue
- Better life quality for Jordanians

Criteria

- High quality (3)
- Action-oriented
- Clarity
- Sustainability (3)
- Local community benefits
- Jordanian
- Inclusive
- Increase % contribution to GDP
- Extend tourists length of stay by X days
- Remove obstacles to growth
- 6% GDP growth with 2% contribution by tourism
- Strategic agreement signed by government and private sector
- Broad understanding by all Jordanians
- Bullet points easy to read and understand
- 25% of workforce in tourism
- Time - before the end of this year
- Weeks rather than months
- Time - 3 years bench marked
- Interim press releases
- Strategy delineates roles and responsibilities of both sectors
- Attractive to audience
- Commitment
- Establish high level support
- Phased approach
- Increase local stakeholder participation
- Creative
- Unique
- Segment-focused marketing
- Qualify stakeholders by 2004
- Double room capacity in certain destinations (Aqaba)
- Increase capacity with airlines
- Occupancy 75% and over
- Every year 10% increase in tourism receipts over 10 years
- 700 000 more arrivals
- Increase number of visitors by 50% in 2 years
- 6% annual growth
- Increase revenue by 20% annually
- Back to 2000 figures by 2004
- Quantify government returns (revenue) vs. sectoral returns
- Meet customer satisfaction and expectation
- Implementation of plan
- Implementation plan is time bound
- Implementable
- Achievable
- Realistic (3)
- Clear and simple strategy
- Built in review process
- Increase in environmental quality
- Simple and flexible
- Support from highest levels
- Royal court blesses final agreement

Market Makers

Are the elements that make the market and without these working well, tourism potential is severely diminished. Market makers include the following: access (Competitive access by air, sea and land), entry, product related, marketing, regularity and institutional framework, security issues as well as partnership.

+	-
<ul style="list-style-type: none"> • Product • Language • Image • Reception • Attitude • Lack of conference and exhibition halls • Segments niche market • Equipment uniqueness • Natural beauty not just archaeology • Diversity • Affordable labor • Domestic transportation • Cultural sites • Safe country • Security • Safety • Sites • People and friendliness • Hospitality • Location • Geo political position • Attractive sites • Welcome 	<ul style="list-style-type: none"> • Media, press • Language • Image (cited several times) • Reception • Attitude • Open skies • Complicated decision making process • Need proper training (all sectors) • Laws (cited several times) • Professional staff • New products • Unified image by tourism promoters • Entry procedures • Security (regional) • Market research • Institutional structures and framework • Air accessibility - i.e. carrying capacity for groups • Supporting services • Internal transportation - no seat belts on buses • International networks • Knowledge and rating of guides • Few qualified tour operations • Priority of locations - nature, culture, archeology (low maintenance) • Visa regulations and airport procedure • Misperception • Weakness in individual tourism • Products for all age groups • Cost of access • Lack of specialist knowledge and information (maps) • Regional image • Visa and departure tax procedures • Institutions • Entry • Customs on boarder • Airline capacity • Entertainment • Location • Standards and site • Untapped adventure and excitement • Need safety and security • Need quality service

Market Drivers

These elements drive growth in the tourism economy. Market drivers include issues related to investment, competitiveness, distribution and sales, marketing and marketing support as well as planning.

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<ul style="list-style-type: none"> • Not over sanitized and westernized • Image building • Communication channels • Transparency • Mucho dineros • Investment • Climate • Web based info could be + • Private sector conducive environment • MOTA the bulk stops here • E - tourism • Free industry information • Investment opportunities • Learn from mistakes and others • Systems in place • Nature • Adventure • Unique adventure market niche • Exotic yet familiar • Small can make change and doable • Literacy rate • Hospitable population • Smiles • Visitor info centers • Empty hotels for rapid expansion • Abundance of first class accommodation and busses • Ability to grow • Commitment to improve • Arabic art and culture • Political stability (oasis of calm) • Generous incentives for investors • Clean food • Favorable internal political standing 	<ul style="list-style-type: none"> • Not over sanitized and westernized • Image building • Communication channels • Transparency • Mucho dineros • Market focus • Niche markets established • Distribution network • Improve laws • Marketing and advertising budgets • Forget the little man • Weak information - based decision making • Need better signage in museums • Market information • Need for integration among sector players • Need improved communication with JTB offices of activities in tourism • Communication • Improve people understanding of tourism products and programs and their benefits • Vision and positioning • Need information on opportunities • Need to diversify products • Need promotion of alternative products • Lack of knowledge among government of tourism product • Stress on comparative advantages • Need outline diversified activities • Need targeted marketing • Need better web exposure • Lack of diverse accommodation • Weak use of WB - based promotion • Need training • Need data collection and dissemination

Next Steps

- Produce summary of brainstorm from meeting
- Produce follow up email, including
 - Brainstorms
 - Next steps
 - Request for draft vision statements

- Develop draft calendar through September
- Develop calendar through Petra event
- Develop logistics plan
 - Petra
 - Post Petra
- Begin developing draft vision statements

- Identify Petra participants
- Interview them as input to workshop design and strategy
- Identify topics for Petra tasks
- Develop agenda and design cafeteria of tasks for Petra

- Develop displays for Petra to showcase the industry
 - JTB brochures and advertising
 - Royal Jordanian's upcoming advertising campaign
 - Materials from other JTB members: business associations/organizations
 - Examples of campaigns we liked, images that work, from any country

- Clarify role of facilitators in email
- Identify facilitators
- Schedule training
- Train facilitators
- Identify transcribers

- Identify topics for research/expertise as input to strategy (missing pieces)
- Identify subject matter experts to address topics
- Prepare scopes of work for required outside expertise
- Recruit subject matter experts
- Initiate research/data collection for strategy
- Begin competitiveness study before Petra

- Identify topics for post-Petra sessions
- Identify post-Petra topics for committees
- Develop job descriptions for committees
- Identify committee co-chairs, members
- Identify sub-committees
- Identify sub-committee co-chairs, members
- Schedule meetings of committees/work groups

- Prepare strategic launch (post-Petra, pre-committees)
- Begin branding the initiative
- Conduct study tour to Irish Tourism Board

Additional stakeholders

- Ministry of Foreign Affairs
- Ministry of Finance
- Ministry of Interior - borders, visas, customs
- Ministry of Planning
- Ministry of Roads and Transport

- Local Community Tourism Cooperation
- MOP Competitiveness Unit
- Civil Aviation
- Royal Wings Airline